



Republic of Uganda
National Planning Authority

Request for Proposals Document
For
Procurement of Consultancy Services
without Publication of a Notice of
Expression of Interest

Subject of Procurement: Independent Evaluation of the Universal Primary Education Evaluation.

Procurement Reference Number : NPA/Srvcs/2016-17/00049

Date of Issue: 4th November , 2016

PREFACE

1. This Standard Request for Proposals (RFP) document has been prepared by the Public Procurement and Disposal of Public Assets Authority (PPDA) for use by Procuring and Disposing Entities (PDEs) for the procurement of Consultancy Services. The procedures and practices presented in this RFP have been developed to reflect the requirements of the Public Procurement and Disposal of Public Assets Act, 2003 and the Public Procurement and Disposal of Public Assets, Regulations 2014 and best international procurement practices.
2. This RFP is suitable for use for procurement of consultancy services without publication of a notice of expression of interest. The RFP may also be used invite single or sole source consultants with appropriate modifications to the document.
3. This RFP can be used with the different selection methods described in the PPDA Regulations namely, quality and cost based selection (QCBS), quality based selection (QBS), fixed budget selection (FBS), and least cost selection (LCS) and consultant's qualification selection (CQS). The User Guide to this RFP further elaborates on how to use these methods of evaluation in the RFP.
4. Before using this RFP, the user should be familiar with the PPDA Act, 2003 and Regulations, 2014 and should read the User Guide to this RFP which has been prepared to provide guidance on the correct use of the Standard Request for Proposals (RFP) for Consultancy Services as a model for preparing an individual Request for Proposals.

PPDA welcomes any feedback or comments from the users of this RFP which will assist in improving this document.

**The Executive Director,
Public Procurement and Disposal of Public Assets Authority
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KAMPALA.
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Standard Request for Proposals Document

Contents

Standard Invitation to Consultants 4

Section 1: Instructions to Consultants 6

Section 2: Technical Proposal Submission Sheet 10

Section 3: Financial Proposal Submission Sheet 13

Part 2: Statement of Requirements 15

 Terms of Reference 15

Part 3: Contract..... 26

 Section 5: General Conditions of Contract..... 26

 Section 6: Special Conditions of Contract..... 26

 Section 7: Agreement 29

Standard Invitation to Consultants

January 16th, 2017

Request for proposal for consultancy service to undertake Independent Evaluation of the Universal Primary Education

Procurement Reference Number: NPA/Srvcs/2016-17/00049

The National Planning Authority (NPA) has allocated funds to be used for the acquisition of International and national individual consultants with expertise knowledge in the following areas; (i) Institutional, policy, legal and regulatory frameworks; (ii); Education Economics; (iii) Curriculum design; and (iv) Teacher training. The international team will be supported by national counterparts to each of the thematic. In addition, a gender specialist and a statistician will be included on the national team.

The Entity invites sealed proposals for the provision of the above services.

Bidding will be conducted in accordance with the with the method of short listing of Consultants without publication of an expression of interest contained in the Government of Uganda's Public Procurement and Disposal of Public Assets Act, 2003, the PPDA (Procurement of Consultancy Services) Regulations, 2014 and the procedures described in Part 1: Proposal Procedures.

You may obtain further information and inspect the proposal documents at the address given below at 8(a) from 8.30am to 4.00pm

Proposals must be delivered to the address below at 8(c) at or before **28/02/2017**. Late proposals shall be rejected. Proposals will be opened in the presence of the consultants' representatives who choose to attend at the address below at 8(d) at **4.30pm**

There shall/ shall not be a pre – proposal meeting/ site visit at N/A on the dates indicated in the proposed schedule in this notice.

Documents may be inspected at: *National Planning Authority (NPA), Planning House, Plot 17A Clement Hill, Road, and Kampala-Uganda*

Documents will be issued from: *NPA*

Proposals must be delivered to: *NPA*

Address of Proposal Opening: *NPA*

Please inform us, upon receipt:

- (a) that you received the letter of invitation; and
- (b) Whether you will submit a proposal alone or in association.

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Standard Invitation to Consultants

The planned procurement schedule (subject to changes) is as follows:

Activity	Date
Issue of invitation to bid letter	16 th January , 2017
Proposal closing date	28 th February ,2017
Evaluation Process	01 st to 14 th March 2016
Display and communication of best evaluated bidder	24 th March , 2017
Contract signature	After Clearance of SG

Signature:

Name: **Joseph Muvawala (PhD)**

Position of Authorised Official: **EXECUTIVE DIRECTOR**

Part 1: Proposal Procedures

Section 1: Instructions to Consultants

Procurement Reference Number: _____

Preparation of Proposals: You are requested to submit separate technical and financial proposals, as detailed below. The standard forms in this RFP may be retyped for completion but the Consultant is responsible for their accurate reproduction.

You are advised to carefully read the complete Request for Proposals document, including the Special Conditions of Contract in Part 3: Contract, before preparing your proposal.

Where an electronic copy of the Request for Proposals Document is issued, the paper or hard copy is the original version. In the event of any discrepancy between the two, the hard copy shall prevail

Preparation of Technical Proposals: Technical proposals should contain the following documents and information:

1. The Technical Proposal Submission Sheet in this Part;
2. A brief methodology for performing the services;
3. A work plan, showing the inputs of all key staff;
4. CV's of key staff;
5. A summary of your experience in similar assignments;
6. The documents evidencing your eligibility, as listed below.

Preparation of Financial Proposals: Financial proposals should contain the following documents and information:

1. The Financial Proposal Submission Sheet in this Part;
2. A copy of the breakdown of Lump Sum Price form in this Part for each currency of your proposal, showing all costs for the assignment, broken down into fees and reimbursable and miscellaneous costs;

Validity of Proposals: Proposals must remain valid until 30/03/2018.

Sealing and marking of Proposals: The technical and financial proposals should be sealed in separate envelopes, both clearly marked with the Procurement Reference Number above, the Consultant's name, the name of the Procuring and Disposing Entity and either "Technical Proposal" or "Financial Proposal" as appropriate.

Both envelopes should be enclosed in a single outer envelope, clearly marked with the Procurement Reference Number above, the Consultant's name and the name of the Procuring and Disposing Entity. All three envelopes should be sealed in such a manner that opening and resealing cannot be achieved undetected and bear a warning not to open before the time and date for proposal opening.

Submission of Proposals: Proposals should be submitted to the address below, no later than the date and time of the deadline below. Any proposal received by the Procuring and Disposing Entity after the deadline for submission of proposals shall be declared late, rejected, and returned unopened to the Consultant.

Date of deadline: 28/02/2017.

Time of deadline: 4.30 pm.

Address: National Planning Authority
P.Box.21434 Kampala-Uganda

Part 1: Proposal Procedures

Opening of Proposals: Technical Proposals will be opened in public by the Procuring and Disposing Entity at the time, date and address shown above for submission of proposals. A record of the opening will be posted on the Procuring and Disposing Entity's Notice Board within one working day of the opening. Financial Proposals will be kept unopened and the evaluation committee shall have no access to financial information until the detailed evaluation is concluded.

Evaluation of Proposals: The evaluation of Proposals will use the _____ methodology as detailed below:

1. Preliminary examination to determine eligibility (as defined below) and administrative compliance to this Request for Proposals on a pass/fail basis;
2. Detailed evaluation _____;
3. Financial comparison _____ and to determine the best evaluated bid.

Proposals failing any stage will be eliminated and not considered in subsequent stages.

Eligibility Criteria: You are required to meet the following criteria to be eligible to participate in public procurement:

1. have the legal capacity to enter into a contract;
2. not be insolvent, in receivership, bankrupt or being wound up or subject to legal proceedings for any of these circumstances;
3. not have had your business activities suspended;
4. have fulfilled your obligations to pay taxes and social security contributions;
5. have the nationality of an eligible country, as defined in the Special Conditions of Contract;
6. not to have a conflict of interest in relation to this procurement requirement; and
7. not to be subject to suspension by the Public Procurement and Disposal of Public Assets Authority.

Documents Evidencing Eligibility: Consultants are requested to submit copies of the following documents as evidence of your eligibility and sign the declaration in the Technical Proposal Submission Sheet:

1. A certificate of registration issued by the Authority for bidders currently registered with the Authority or a copy of the Bidder's Trading license or equivalent and a copy of the Bidder's Certificate of Registration or equivalent for bidders not currently registered with the Authority;
2. Evidence of fulfillment of obligations to pay taxes and social security contributions in Uganda where applicable
3. Any other relevant documentation.

Nationality of Personnel: All personnel employed under any resulting contract shall have the nationality of an eligible country as defined in the Special Conditions of Contract. Any related supplies or works purchased under any resulting contract shall have as their country of origin an eligible country, as defined in the Special Conditions of Contract.

Part 1: Proposal Procedures

Technical Criteria: Proposals shall be awarded scores out of the maximum number of points indicated below for each of the following criteria:

Specific Experience	35
(a) 8 year working experience in undertaking policy research	
(b) Minimum of 10 years of experience in analyzing the household survey data	
(c) Availability and motivation to commit significant time to the process of producing a high-quality product.	
(d) Availability and motivation to commit significant time to the process of producing a high-quality product.	
(e) Availability and motivation to commit significant time to the process of producing a high-quality product.	
(f) Sound knowledge on the situation in the Uganda's Education system	
(g) Superior analytical and writing skills, preferably demonstrated by the peer-reviewed journals.	
(h) Excellent communication and highly developed self-management skills	
(i) Previous experience in working with modeling is an asset.	
Methodology Proposed	35
Qualification of Key Personnel	10
An advanced degree in Economics, Development Economics, Economic Policy and Planning, Statistics and Social Science or a closely related field from a reputable University	
Transfer of Knowledge	15
(a) Proven experience working with teams and liaising with inter-agency teams	
Participation by Nationals	05
Total:	100

The minimum technical score required to pass the technical evaluation is 70 points.

Financial Criteria:

Currency: Proposals may be priced in Uganda Shillings or any other freely convertible currency and in up to two currencies. The currency of evaluation will be _____. Proposals in other currencies will be converted to this currency for evaluation purposes

Part 1: Proposal Procedures

only, using the exchange rates published by the Bank of Uganda on the date of the submission deadline.

Best Evaluated Bid: The best evaluated bid shall be _____ and shall be recommended for award of contract. The Procuring and Disposing Entity shall issue a Notice of Best Evaluated Bidder within 5 working days from the decision of the contracts committee to award a contract, place such Notice on its notice board for the prescribed period, copy the Notice to all Consultants and to the Authority for publication on its website, prior to proceeding with contract award.

Award of contract: Award of contract shall be by placement of an Agreement in accordance with Part 3: Contract. A Procuring and Disposing Entity shall not award a contract to the best evaluated bidder until the lapse of ten days after the date of display of the Notice of Best Evaluated Bidder.

Right to Review: Consultants may seek administrative review by the Accounting Officer in accordance with the Public Procurement and Disposal of Public Assets Act, 2003 if they are aggrieved with the decision of the Procuring and Disposing Entity.

Right to Reject: The Procuring and Disposing Entity reserves the right to accept or reject any proposal or to cancel the procurement process and reject all proposals at any time prior to contract signature and issue by the Procuring and Disposing Entity, without incurring any liability to Consultants.

Part 1: Proposal Procedures

Section 2: Technical Proposal Submission Sheet

[Complete this form with all the requested details and submit it as the first page of your technical proposal, with the documents requested above attached. Ensure that your technical proposal is authorized in the signature block below. A signature and authorization on this form will confirm that the terms and conditions of this RFP prevail over any attachments. If your proposal is not authorized, it may be rejected.]

Proposal Addressed to (Procuring and Disposing Entity):	
Date of Technical Proposal:	
Procurement Reference Number:	
Subject of Procurement:	

I/We offer to provide the services described in the Statement of Requirements, in accordance with the terms and conditions stated in your Request for Proposals referenced above.

I/We confirm that I/we are eligible to participate in public procurement and meet the eligibility criteria specified in Part 1: Proposal Procedures of your Request for Proposals.

I/We, including any subcontractors or consultants for any part of the contract resulting from this procurement process are registered with the Authority. *[Consultants who are not registered or whose subcontractors are not registered should amend the statement to reflect their status].*

I/We have signed and undertake to abide by the Code of Ethical Conduct for Bidders and Providers attached during the procurement process and the execution of any resulting contract;

My/Our proposal shall be valid until _____ *[insert date, month and year]* and it shall remain binding upon us and may be accepted at any time before or on that date;

I/We enclose a separately sealed financial proposal.

Technical Proposal Authorised By:

Signature: _____ Name: _____

Position: _____ Date: _____
(DD/MM/YY)

Authorised for and on behalf of:

Company: _____

Address: _____

Part 1: Proposal Procedures

CODE OF ETHICAL CONDUCT IN BUSINESS FOR BIDDERS AND PROVIDERS

(Under Section 93 of the Public Procurement and Disposal of Public Assets Act, 2003)

1. Ethical Principles

Bidders and providers shall at all times-

- (a) maintain integrity and independence in their professional judgement and conduct;
- (b) comply with both the letter and the spirit of-
 - i. the laws of Uganda; and
 - ii. any contract awarded.
- (c) avoid associations with businesses and organisations which are in conflict with this code.

2. Standards

Bidders and providers shall-

- (a) strive to provide works, services and supplies of high quality and accept full responsibility for all works, services or supplies provided;
- (b) comply with the professional standards of their industry or of any professional body of which they are members.

3. Conflict of Interest

Bidders and providers shall not accept contracts which would constitute a conflict of interest with, any prior or current contract with any procuring and disposing entity. Bidders and providers shall disclose to all concerned parties those conflicts of interest that cannot reasonably be avoided or escaped.

4. Confidentiality and Accuracy of Information

- (1) Information given by bidders and providers in the course of procurement processes or the performance of contracts shall be true, fair and not designed to mislead.
- (2) Providers shall respect the confidentiality of information received in the course of performance of a contract and shall not use such information for personal gain.

5. Gifts and Hospitality

Bidders and providers shall not offer gifts or hospitality directly or indirectly, to staff of a procuring and disposing entity that might be viewed by others as having an influence on a government procurement decision.

6. Inducements

- (1) Bidders and providers shall not offer or give anything of value to influence the action of a public official in the procurement process or in contract execution.
- (2) Bidders and providers shall not ask a public official to do anything which is inconsistent with the Act, Regulations, Guidelines or the Code of Ethical Conduct in Business.

7. Fraudulent Practices

Bidders and providers shall not-

- (a) collude with other businesses and organisations with the intention of depriving a procuring and disposing entity of the benefits of free and open competition;
- (b) enter into business arrangements that might prevent the effective operation of fair competition;
- (c) engage in deceptive financial practices, such as bribery, double billing or other improper financial practices;

Part 1: Proposal Procedures

- (d) misrepresent facts in order to influence a procurement process or the execution of a contract to the detriment of the Procuring and Disposing Entity; or utter false documents;
- (e) unlawfully obtain information relating to a procurement process in order to influence the process or execution of a contract to the detriment of the PDE;
- (f) withholding information from the PDE during contract execution to the detriment of the PDE.

I agree to comply with the above code of ethical conduct in business.

AUTHORISED SIGNATORY

NAME OF CONSULTANT

Part 1: Proposal Procedures

Section 3: Financial Proposal Submission Sheet

[Complete this form with all the requested details and submit it as the first page of your financial proposal, with the documents requested above attached. Ensure that your proposal is authorised in the signature block below. A signature and authorisation on this form will confirm that the terms and conditions of this RFP prevail over any attachments. If your proposal is not authorised, it may be rejected. The total price of the proposal should be expressed in the currency or currencies permitted in the instructions above.]

Proposal Addressed to (Procuring and Disposing Entity):	
Date of Financial Proposal:	
Procurement Reference Number:	
Subject of Procurement:	

The total price of our proposal is: _____ .

We confirm that the rates quoted in our Financial Proposal are fixed and firm for the duration of the validity period and will not be subject to revision or variation.

Financial Proposal Authorised By:

Signature: _____ Name: _____

Position: _____ Date: _____
(DD/MM/YY)

Authorised for and on behalf of:

Company: _____

Address: _____

Part 2: Statement of Requirements

Terms of Reference

Procurement Reference Number: NPA/Srvcs/2016-17/00049

Terms of Reference for independent Evaluation of the Universal Primary Education

1. Background

The Government of Uganda through the Education Policy Review Commission issued a report in 1989 that called for the universal primary education (UPE) by the year 2000. According to the report, the objectives of the UPE program are to: (1) provide facilities and resources to enable every child to enter school; (2) ensure the completion of the primary cycle of education; (3) make education equitable in order to eliminate disparities and inequalities; (4) ensure that education is affordable by the majority of Ugandans; and (5) reduce poverty by equipping every individual with basic skills.

The NDP2 highlights that the implementation of UPE program since 1997 resulted into increased access, from 2.5 million to 8.5 million pupils in 2013. The NDP2 baseline data also indicates that the repetition rate reduced from 11.7percent in 2009 to 10.3percent in 2013, while the gender gap in primary schools has narrowed to about 1percent (50.5percent girls and 49.5percent boys). On the other hand, the Pupil-textbook ratio stagnated at an average of 4:1 and the pupil-teacher ratio at the national level also stagnated at 49:1 during the period between 2009 and 2013.

A number of studies have shown that the UPE programme continues to face the challenges of high school drop-out rates, low completion rates and low performance on learning outcomes and limited impact on inequality and poverty reduction. These trends are significantly aggravated by social and economic challenges (UWEZO Uganda sixth Learning Assessment Report (2016), ANPPCAN-UGANDA (2008)).

With regard to the post-UPE skills development, while significant progress has been made towards skilling of the country's labour force, the economy still faces substantial skills gaps in key sectors. Over the last five years, progress has been made mainly in formal areas of Business, Technical, Vocational Education and Training (BTVET), registering a 73 per cent increase in enrolment, from 24,598 in 2009 to 42,674 in 2013, of which 28,024 (66 per cent) are male and 14,650 (34 per cent) are female. At the higher education level, total enrolment increased by 18 per cent from 169,476 in 2009 to 201,376 in 2013, with a significant increase in female enrolment.

Part 2.: Statement of Requirements

Piecemeal analysis of UPE outputs and outcomes provide mixed results that make it difficult to precisely provide the success and drawbacks of the programme that should form the basis for the roadmap towards achieving the desired UPE objectives and quality.

It is within this context that the National Planning Authority, in consultation with all concerned bodies, development partners and other key non-state actors, is commissioning an independent comprehensive evaluation of the UPE program, to provide lessons required to inform wide-ranging policy planning and implementation improvements.

In order to carry out this evaluation, the Authority wishes to engage a team of Five (5) International consultants and Ugandan counterparts to undertake the activity.

Objectives of the Consultancy

The overall objective of this evaluation is to assess the policy impact of the UPE program on learning outcomes, skills development, poverty reduction, inequality and affordability in order to provide a benchmark for informed policy action for sustainable quality UPE delivery.

The specific objectives for the UPE evaluation are to:

- 1) Assess the extent to which the goals and objectives of the UPE program have been achieved and their relevance;
- 2) Assess the adequacy of the policy, legal and regulatory frameworks in the delivery of UPE;
- 3) Assess the adequacy of the implementation institutional framework and coordination mechanisms (i.e. Structures, Key Actors, Roles and Responsibilities, UPE Partners) in the delivery of UPE;
- 4) Assess the effectiveness of the Planning, budgeting, monitoring and Financing Frameworks; and
- 5) Assess the impact of the UPE program on acquisition of basic skills and knowledge necessary for exploitation of the environment for self-development, life sustenance and social development.

2. Scope

Overall, the independent review of the UPE program will be bench-marked on international best practices that include:

Relevance: This will involve assessing the extent to which the program is suited to the National Development Planning framework that is currently in place by considering:

- The extent to which the objectives are still relevant and valid;
- Consistency of the activities and outputs to the overall UPE goals and objectives; and

Part 2.: Statement of Requirements

- Consistency of the activities and outputs to the intended UPE impacts and effects.

Effectiveness: This will involve:

- Assessing the relevance of the policy extent of achievement and likelihood of achieving the objectives; and
- Establishing the major factors influencing the achievement or non-achievement of the objectives the and propose policy actions required to remedy the situation.

Efficiency: This will involve an assessment of the efficiency in achieving the outputs (qualitative and quantitative), in relation to the inputs. The efficiency assessments will thus include analyses of the cost-effectiveness, quality, timeliness, in comparison to alternatives.

Impact: This will involve assessing the positive and negative changes from the UPE program, direct and indirect and intended and unintended. The impact assessment of the UPE programme will therefore analyse the results of the social, economic, environmental and other development indicators. In particular, the analysis will include the resulting effects of UPE and the difference made to beneficiaries.

Sustainability: The comprehensive UPE Evaluation will also include assessing continuity of the UPE programme in relation to budgetary, capacity and partnerships implications including community participation aspects.

3. Duties and Responsibilities

3.1 Key Activities

- (i) **Review existing materials:** The Consultant is expected to review and analyse materials that are relevant to the comprehensive UPE evaluation. These include; the documented policy, legal and regulatory frameworks, the documented landmarks of the UPE institutional frameworks, existing reviews and documented studies.
- (ii) **Undertake fieldwork to collect data relevant to the review:** The Consultant is expected to undertake fieldwork within the country for purposes of collecting data to inform the evaluation; conduct data analysis; and conduct meetings with stakeholders at various levels to obtain accurate information, as will be found necessary. This will entail analysis of: the effectiveness of the Planning, budgeting and Financing Frameworks; and the impact of the UPE program on acquisition of basic skills and knowledge necessary to exploit the environment for self-development, life sustenance and social development.

Part 2.: Statement of Requirements

- (iii) **Conduct workshops and conferences:** The Consultant will conduct consultations, information gathering and validation workshops to inform analysis and the recommendations of the evaluation. The Consultant will also participate and take lead in the national report dissemination conference; and
- (iv) **Preparation of the reports:** The Consultant is expected to produce a report based on the dimensions of the evaluation, namely; (i) Policy, legal, regulatory and institutional frameworks; (ii) Education Economics; (iii) Teacher Training; and (iv) The Consultant will also produce a synthesised final summary report on the pertaining situation, findings and recommendations.

3.2 Deliverables

Key deliverables expected from the Consultant are:

- ii Inception report detailing the Consultant's understanding of the terms of reference, scope, methodology for executing the evaluation, including a proposed structure of the Report
- iii The consolidated UPE Evaluation Report containing findings and analysis from the 5 thematic areas, in three (3) copies of both soft and hard copy
- iiii Data bases comprising the data collected for NPA archiving

In utilizing the services of the Consultant, the National Planning Authority will;

- i. Constitute the team and partners to work with the Consultant
- ii. Source funding for the evaluation
- iii. Be responsible for coordination and management of the pre-evaluation arrangements and fieldwork of the evaluation
- iv. Take responsibility for the overall activity and ensure achievement of intended evaluation objectives

4.0 Operational Structure and Management

4.1 Operational Structure

The evaluation will be executed through a team of International consultants who will be procured through competitive bidding. The team of international consultants will comprise experts in the areas of: (i) Institutional, policy, legal and regulatory frameworks; (ii); Education Economics; (iii) Curriculum design; and (iv) Teacher training. The international team will be supported by national counterparts to each of the thematic. In addition, a gender specialist and a statistician will be included on the national team.

Part 2.: Statement of Requirements

The evaluation will be technically overseen by NPA under the leadership of the Executive Director in a collaborative arrangement of various key agencies, namely: (i) Ministry of Education and Sports; (ii) Uganda National Examinations Board (UNEB); (iii) Ministry of Local Government; (iv) the Civil Society (NGO Forum); (v) Makerere School of Statistics and Planning; (vi) Ministry of Gender, Labour and Social Development; (vii) Economic Policy Research Centre (EPRC); (viii) Office of the Prime Minister; (ix) Ministry of Finance Planning and Economic Development; (x) Uganda Bureau of Statistics; and (xi) the Education Donor Working Group. Representatives of these institutions will constitute the inter-agency technical committee to over-see the technical implementation of the evaluation. Terms of Reference will be drawn for the technical committee and other sub-committees to be put in place.

The inter-agency committee will be responsible for quality assurance and recommending all technical outputs for approval by the NPA Executive Authority.

4.2 Timing and reporting

The comprehensive UPE evaluation is expected to take duration of 5 calendar months.

All the consultants will be responsible to the Executive Director of NPA but the day to day management will be done by the Head Monitoring and Evaluation.

5 Team Composition

The team composition and expertise required is as follows:

The lead Consultant will be expected to also take responsibility of one of the thematic areas, from among; (i) institutional framework, (ii) policy, legal and regulatory frameworks, (iii) Education Economics, (iv) Curriculum design, (v) Teacher training. The local consultants will be expected to contribute counter-parts to each of the above areas in addition to providing a gender specialists and a statistician.

The international consultants will be the team leaders of all the 5 thematic areas.

6. Remuneration

Payments for all the Consultants involved will be made in three instalments, in line with the contract agreement as follows:

- i. 30 per cent upon production and approval of an inception report;
- ii. 40 per cent upon production of an acceptable draft report; and

Part 2.: Statement of Requirements

- iii. 30 per cent upon production and approval of the final report and other deliverables herein specified.

7. Application procedure

Applicants, both international and national are required to submit their Expression of Interest comprising both the technical and financial proposals by 3rd February 2017.

8. Specific Terms of Reference and Qualifications for the International Consultants

This evaluation will require four (4) individual International and counterpart Local experts in the areas of: Policy, Legal, Regulatory and Institutional Frameworks; Education Economics; Curriculum Design; and Teacher Training. The specific Terms of Reference and required qualifications for the International Consultants are given in the sections below.

i) Policy, Legal, Regulatory and Institutional Frameworks Consultant (Team Leader)

Qualifications and experience:

Master's Degree in the; Legal field, Public Administration, Education Policy and Planning or other relevant fields.

Experience:

- Proven experience in developing and reviewing draft Laws, regulations, and other Government documents;
- Extensive knowledge of policy, legal and regulatory framework in the area of Education;
- Good knowledge of Government of Uganda Public Sector Management and Administration architecture and operations
- Overall knowledge about Public Administration management tools.
- At least ten (10) years of professional experience in Educational Policy Planning, coordination and/or implementation of Educational programmes and/or monitoring and evaluation

Abilities:

- Ability to analyse, develop and review legal, regulatory and institutional frameworks;
- Ability to work in a team;
- Efficient communications and writing skills;

Personal qualities:

- Management competences, Responsibility, creativity, promptness and punctuality.

Part 2.: Statement of Requirements

Specific Terms of Reference

- a. Collect and analyse available documentation regarding the UPE Policy, Legal, Regulatory and Institutional frameworks;
- b. Assess the effectiveness and impact of the existing policy, legal, regulatory and institutional frameworks within which the UPE programme is implemented;
- c. Analyse the existing policy, legal, regulatory and institutional frameworks, with a view to benchmark them to international best practices;
- d. Assess the extent of implementation of the policy, legal, regulatory and institutional reforms aimed at achieving the UPE objectives; and
- e. Identify Policy, legal and regulatory framework barriers to successful implementation of UPE in Uganda.

ii) Education Economics Consultant

Qualifications

A Master's degree in Economics, Statistics, Development Economics, Economic Policy and Planning, Education Economics, or a closely related field from a reputable University. A PhD in a relevant discipline will be an added advantage.

Experience

- Experience in management and analysis of time-series and survey data
- Good understanding of the education sector for better understanding of handling data sets
- He/she should have at least 5 years working experience with educational related systems especially for Uganda.

Abilities

- Skills in Statistics and Economic Analysis
- Ability to analyse qualitative and quantitative
- Ability to work in a team;
- Efficient communications and writing skills;

Personal qualities:

- Management competences, Responsibility, creativity, promptness and punctuality.

Specific Terms of Reference

- a. Review literature relating to UPE financing, performance and delivery systems and mechanisms to inform the UPE evaluation;

Part 2.: Statement of Requirements

- b. Assess the effectiveness and efficiency of the UPE financing systems and mechanisms;
- c. Assess the efficiency and effectiveness of planning, budgeting and financing frameworks.
- d. Identify the most significant factors that have influenced the UPE outcomes;
- e. Assess the impact of the political economy and socioeconomic changes on the performance of the UPE programme;
- f. Analyse the economic and social benefits of UPE, with a view to provide medium term national estimates of the benefits; and
- g. Assess sustainability of the UPE programme within the projected National Vision 2040 macroeconomic framework.

(iii) Curriculum design

Qualifications

A Master's degree in Education and instructional design or a closely related field from a reputable University. A PhD in a relevant discipline will be an added advantage.

Experience

- Minimum of 3 years in instructional design experience
- Long-term planning curricular design experience based on a given set of standards
- Understanding of curriculum Design principles
- Experience planning and scripting individual objective-driven lessons
- Experience in developing active, practice-based learning experiences (e.g., simulations, role plays, etc.; not lectures and worksheets)
- Experience in teaching and/or designing instructional content
- Evidence/experience driving learning interventions that have delivered impact
- Familiarity with the curriculum design spectrum of Uganda

Abilities

- Proactive collaborator, willing to propose solutions and ideas to challenges based on expertise, debate their merits, and make final recommendations for curriculum design
- Self-reflective and open to frequent feedback from players in the education sector.
- Proactive collaborator, willing to propose solutions and ideas to challenges based on expertise, debate their merits, and make final recommendations for curriculum design

Personal qualities:

Part 2.: Statement of Requirements

- Responsibility, creativity, promptness and punctuality.

Specific Terms of Reference

- a. Review and analyse literature regarding reforms in the country's UPE curriculum design to inform the comprehensive evaluation;
- b. Assess the relevance and effectiveness of the current UPE curriculum in development of talent and innovation and enhancing learning outcomes;
- c. Assess the relevance and effectiveness of the UPE programme in acquisition of basic skills and knowledge necessary for exploitation of the environment for self-development, life sustenance and social development;
- d. Assess and provide recommendations on best practices for building learning interventions, to ensure highest quality products; and
- e. Assess and provide recommendations on best practices for learning management systems use.

iv) Teacher training

Qualifications:

A Master's degree in Education and experience in instructional design or a closely related field from a reputable University. A PhD in a relevant discipline will be an added advantage.

Experience:

- Demonstrated leadership, management and coordination skills,
- Ability to write clear technical reports in English and excellent command of English and associated writing skills.
- Participation in meaningful collaboration between government and Education Sector counterparts and local capacity development
- Proven ability as a facilitator/trainer and Manager
- Strong communication and presentation skills in English
- Ability to work collaboratively with TAs supported by different entities
- Be fully computer literate
- Experience working in Uganda will be an added advantage.

Abilities:

- Good knowledge and skills in education planning and management
- Good appreciation economic concepts and applied education economics
- Good analytical skills
- Very good team work skills and attitude

Part 2.: Statement of Requirements

- Good leadership and coordination skills.
- Excellent writing, communication, and knowledge transfer skills(for capacity building activities)

personal qualities:

- Good Management skills, Responsibility, creativity, promptness and punctuality.

v) Team Leader

Qualifications:

A Master's degree in Economics, Educational Planning and Management, Institutional/Organisational development or related areas. Atleast ten(10) years of professional experience in education policy, planning, coordination and,or implementation of educational programmes programmes and/or monitoring and Evaluation. A PhD in the fields above will be an added advantage.

Experience:

- A minimum of 8 years of professional experience in developing teacher training curricula and coordinating teacher training activities and inputs.
- At least 6 years working experience in designing and implementing teacher training activities and professional development.
- Experience in training of Teachers.
- Preferably experience in working with Uganda and familiarity with Teacher training policies and procedures.
- Experience working in Uganda will be an added advantage.

Abilities:

- Excellent communication and knowledge transfer skills (for capacity building activities).
- Good leadership and coordination skills.

personal qualities:

Management competences, Responsibility, creativity, promptness and punctuality.

Specific Terms of Reference

- a. Review available literature on teacher training reforms to inform the comprehensive evaluation;
- b. Assess the effectiveness and efficiency of the current teacher training and development approaches in achieving UPE objectives;

Part 2.: Statement of Requirements

- c. Assess the effectiveness and relevancy of the current UPE support to teachers.
- d. Assess the effectiveness of the UPE feedback systems to curriculum developers
- e. Assess effectiveness of time on task and other aspects that play a role in effective teaching.
- f. Assess the effectiveness and relevancy of student performance in determining progress, as well as assessment of teacher uptake of education materials.

Part 4: Contract

Part 3: Contract

Section 5: General Conditions of Contract

Any resulting contract shall be subject to the Government of Uganda General Conditions of Contract (GCC) for the Procurement of Consultancy Services (available on request) except where modified by the Special Conditions below.

Section 6: Special Conditions of Contract

Procurement Reference Number: **NPA/Srvcs/2016-17/00049**

The clause numbers given in the first column correspond with the relevant clause number of the General Conditions of Contract.

GCC clause reference	Special Conditions of Contract
Eligible Countries GCC 1.2 (e)	All countries are eligible, unless as a matter of law or official regulation, the Government of Uganda prohibits commercial relations with that country or by an act of compliance with a decision of the United Nations Security Council taken under Chapter VII of the Charter of the United Nations, the Government of Uganda prohibits any import of Supplies from that country or any payments to persons or entities in that country.
Authorised Representatives GCC 4.4	The Authorised Representatives are: For the Procuring and Disposing Entity: Executive Director for the Consultant: _____
Governing Law GCC 5.1	The Contract shall be governed by the Laws of Uganda.
Notices GCC 7.1	For notices , the Procuring and Disposing Entity's address shall be: Attention: Executive Director Street Address: National Planning Authority Floor/Room number: Plot 15A Clement Hill road Town/City: Kampala-Uganda P. O. Box: 21434 Country: Uganda Telephone: Facsimile number: +256-414 250213 Electronic mail address: npa@npa.ug For notices , the Provider's address shall be: Attention: _____ Street Address: _____ Floor/Room number: _____ Town/City: _____ P. O. Box: _____ Country: _____ Telephone: _____ Facsimile number: _____

Part 4: Contract

GCC clause reference	Special Conditions of Contract
	Electronic mail address: _____
Commencement GCC 8.1	The Consultant shall commence the Services within _____ after the date of the Contract.
Dispute Resolution GCC 17.2	The formal mechanism for dispute resolution shall be the Arbitration and Conciliation Act Cap 4 of the Laws of Uganda.
Completion Period GCC 18.1	The period for the completion of the Services shall be: Five Calendar months
Payment GCC 22.1	The Contract is a _____ (Lump Sum or Time Based Contract).
Payment Documentation GCC 24.1	<p>The following documentation shall be required to support invoices requesting payments:</p> <ul style="list-style-type: none"> • The Government of Uganda General Conditions of Contract. • Special Conditions of this Contract • The Terms of Reference • Acceptable report(s) from the Provider, in the manner, style and at the times prescribed in the Special Conditions of this Contract • Award letter • Acceptance letter
Payment Schedule GCC 25.1	<p>The payment schedule shall be: three instalments;</p> <p>(i) 20 per cent upon production and approval of an inception report ;</p> <p>(ii) 30 per cent upon production of an acceptable draft report ; and report</p> <p>(iii) 50 per cent upon production of and approval of the final report and other deliverables herein specified.</p>
Payment Period GCC 27.1	Payments shall be made by the Procuring and Disposing Entity within thirty days of receipt and certification of invoices accompanied by the supporting documents specified in GCC 24.1.
Insurance to be taken out by the Provider GCC 40.1	<p>The Consultant shall take out and maintain the following insurance coverage:</p> <p>(i) Third Party motor vehicle:</p> <p>(ii) Third Party liability:</p> <p>(iii) Employer’s liability and workers’ compensation:</p>

Part 4: Contract

GCC clause reference	Special Conditions of Contract
	(iv) Professional liability: (v) Loss or damage to equipment and property: (vi) Other:

Section 7: Agreement

**Agreement
For Lump Sum/Time Based Contracts**

Procurement Reference No: **NPA/Srvcs/2016-17/00049**

THIS AGREEMENT made this _____ day of _____, _____,
between _____ of _____
(hereinafter called “Procuring and Disposing Entity”), and _____ of _____
_____ (hereinafter called “the Consultant”).

WHEREAS

- (a) The Procuring and Disposing Entity has requested the Consultant to provide certain consultancy services (hereinafter called the “Services”) as defined herein and attached to this Contract;
- (b) the Consultant having represented to the Procuring and Disposing Entity that it has the required professional skills, personnel and technical resources, has agreed to provide the Services on the terms and conditions set forth in this Contract.

NOW THEREFORE the parties hereto agree as follows:

- 1. The documents forming the Contract shall be as stated in and in the order of priority stated in the General Conditions of Contract.
- 2. The mutual rights and obligations of the Procuring and Disposing Entity and the Consultant shall be as set forth in the Contract, in particular:
 - (a) The Consultant shall carry out the Services in accordance with the provisions of the Contract; and
 - (b) the Procuring and Disposing Entity shall pay the Consultant the Contract Price of _____ or such other sum as may become payable under the provisions of the Contract, at the times and in the manner prescribed by the Contract.

IN WITNESS WHEREOF, the Parties hereto have caused this Contract to be signed in their respective names as of the day and year first above written.

Signed by _____ (Authorised Representative of the Procuring
and Disposing Entity)

Name: _____ Position: _____

Part 4: Contract

In the presence of:

Name: _____ Position: _____

Signed by _____ (Authorised Representative of the
Consultant)

Name: _____ Position: _____

In the presence of:

Name: _____ Position: _____